Facilitation Guide

Video 3: Navigating Critical Steps

Every service or maintenance job starts with planning and preparation. Engaging competent people in the work that needs to be done is the first step in creating a good plan. The quality of the plan is dependent on the understanding of the work to be done.

This guide is a companion to the **Navigating Critical Steps** video.

Get the most out of the safety video

01 Before watching the video, discuss with your team:

A critical step is a human action that will trigger:
- Immediate
- Irreversible
- Intolerable harm to an asset, if that action or proceeding action, is performed improperly."
- What critical step(s) may we encounter? For ex: Loosening a fitting on a pressurized line.
- What must go absolutely right, the first time—and every time?

02 Watch the safety video

How do you manage risk in the stages of:
1. Preparation and planning before the job
2. Execution during the job
3. Learning after the job

03 Discuss with your team

- Ask if any information was surprising or confusing?
- Why is it important to have a thorough plan to control hazardous energy?
- How do you ensure that you have the adequate controls to reduce risk?

04 Key takeaways

- Can you identify Stuff That Can Kill You (STCKY) in your everyday work?
- Preparation is foundational – Good planning, hazard identification (like STCKY), and readiness is essential.
- Execution requires awareness – Stay alert to changing conditions, communicate frequently, and adapt as needed. Stay alert and mindful of any upcoming changes involving energy, movement, or information transfer (like signals or data).
- Learning closes the loop – post-job reviews and feedback are vital for continuous improvement (of the organizational system that supports the work and the management of critical steps).
- Ensure that your controls are strong enough for you to fail safely.

05 Review additional resources

A helpful resource on this topic is the book Critical Steps by Tony Muschara, Ron Farris, and Jim Marinus.